

# *info*Advantage – WebIntelligence

## For Advanced Users

Presented by CGI-AMS

July 19, 2005

July 26, 2005



# Agenda

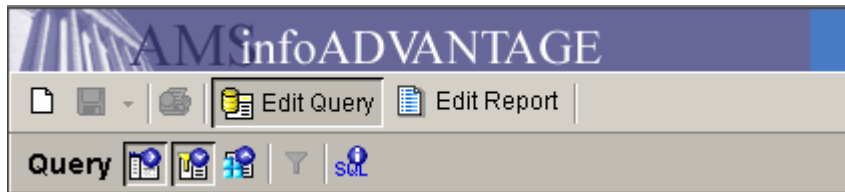
Advanced Topics covers Editing Reports

Java Panel:

- Toolbars
- Enhanced Data Display
  - Create additional report in document
  - Modify Tables
  - Add Charts, Cells
- Modify Data Lay Out
  - Apply calculations
  - Section document



# Toolbars in WebIntelligence – Query Mode



## Query Toolbar

- Visible when in Query Mode

### Show/Hide



Manager: Left hand panel



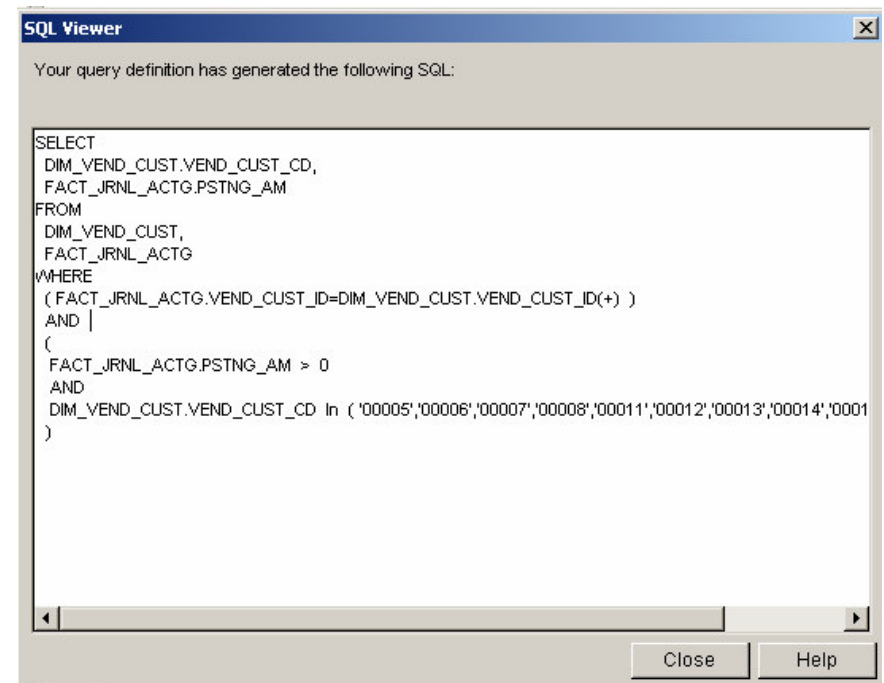
Filter Pane: see what filters are applied



Scope of Analysis: allow drilling to certain extent



Show SQL: actual statement executed against the DB



# Data Retrieve Settings

The screenshot displays the 'Data Retrieve Settings' window with the 'Properties' tab selected. The interface is divided into two main sections: 'Query Properties' on the left and 'Result Objects' on the right.

**Query Properties:**

- Limits:** Includes checkboxes for 'Max rows retrieved' (set to 5000) and 'Max retrieval time' (set to 600).
- Data:** Includes a checkbox for 'Retrieve duplicate rows'.
- Security:** Includes a checkbox for 'Allow other users to edit the query'.
- Prompt Order:** A large empty box with up and down arrow buttons for reordering prompts.
- Context:** Includes a checkbox for 'Reset contexts on refresh' and a 'Clear Contexts' button.

**Result Objects:**

- Displays two objects: 'Vendor Customer Code' and 'Pstng Amount'.

**Query Filters:**

- Shows a filter: 'Pstng Amount Greater than: 0'.
- Includes an 'And' button and a list of values: 'Vendor Customer Code In list: 00005; 00006; 00007'.

**Scope of Analysis:**

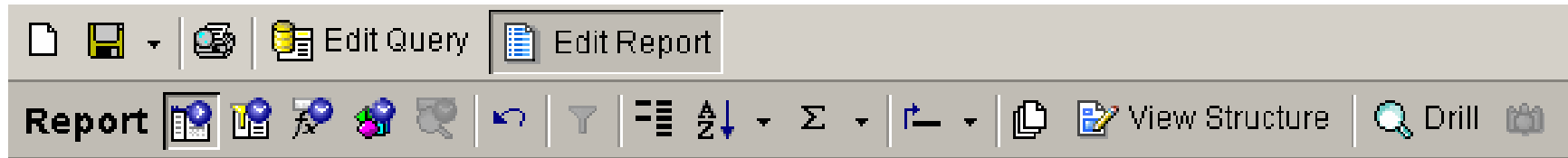
- Set to 'None'.

**Help:** A button at the bottom right of the 'Query Properties' section.





## Properties Tab:

- Set Max # Rows
- Set Max Fetch Time
- Duplicate Rows yes/no
  - Fetch unique rows only ?
- Allow editing
  - Important Security option
- Set prompt order

# Toolbars in WebIntelligence – Report View



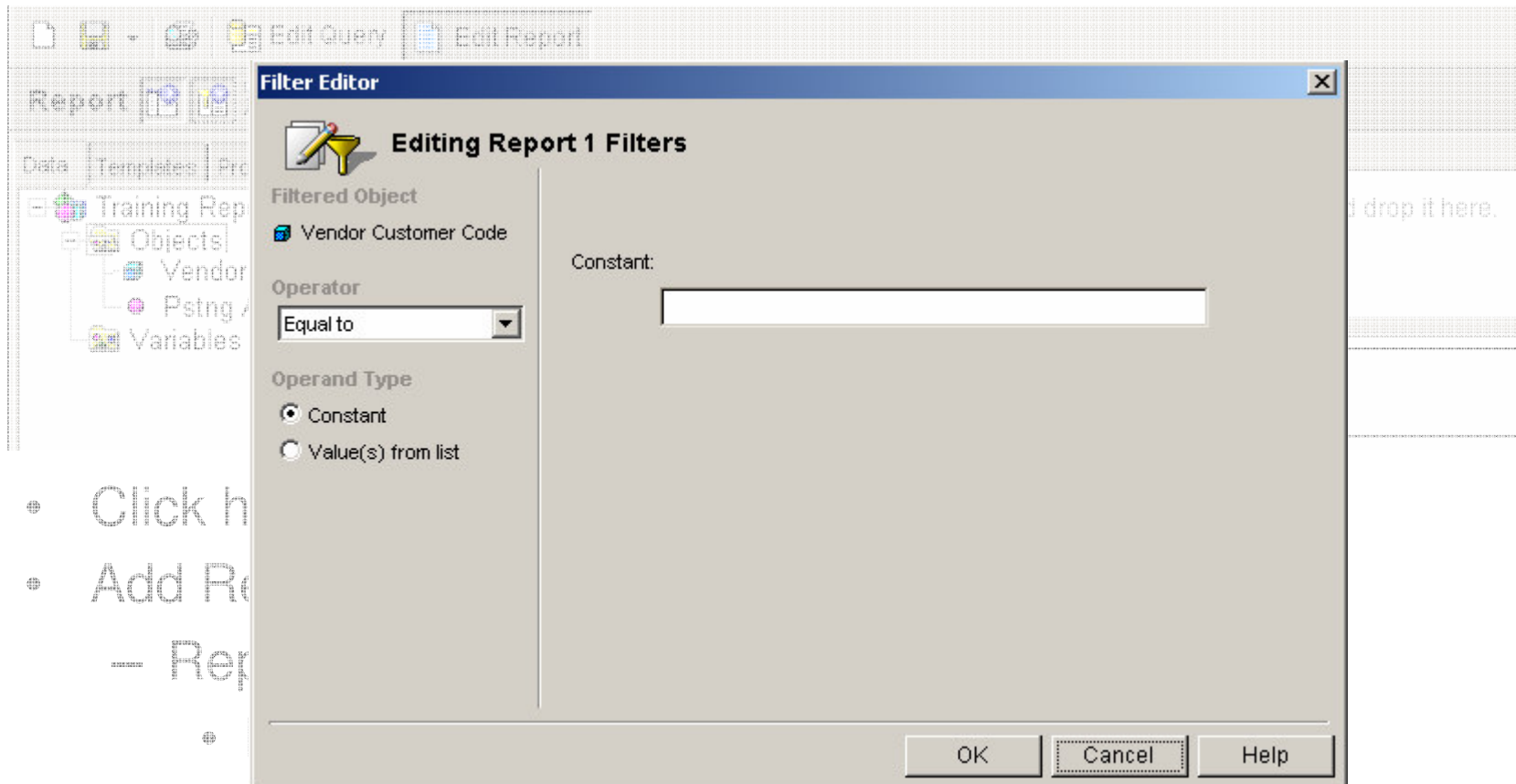
Show/hide:

-  Manager
-  Filter Pane
-  Formula Toolbar
-  Variable Editor

Apply:

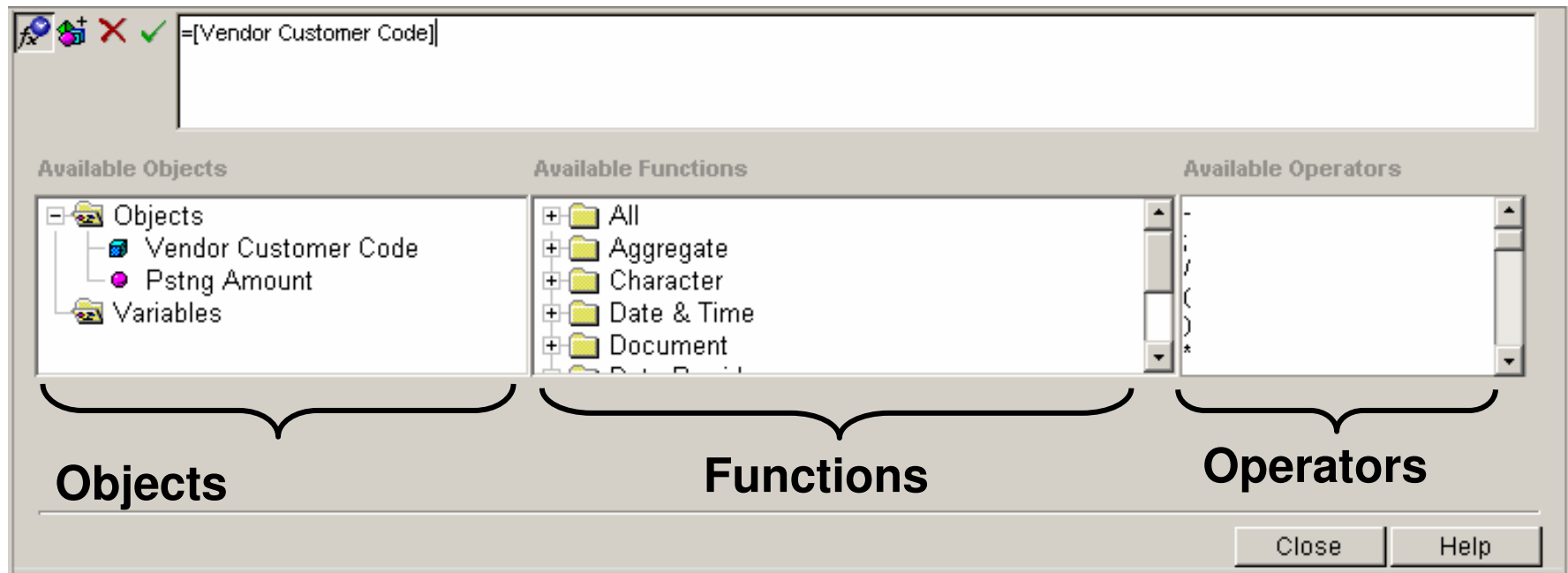
- Breaks
- Sorts
- Calculations
- Insert a row/column
- Page View
- Structure View
- Drill

# View Filter Pane



- Click h
- Add Re
- — Rep
- Can be applied to entire report or just blocks
- Drag and Drop Objects
- Box will pop up to define filter

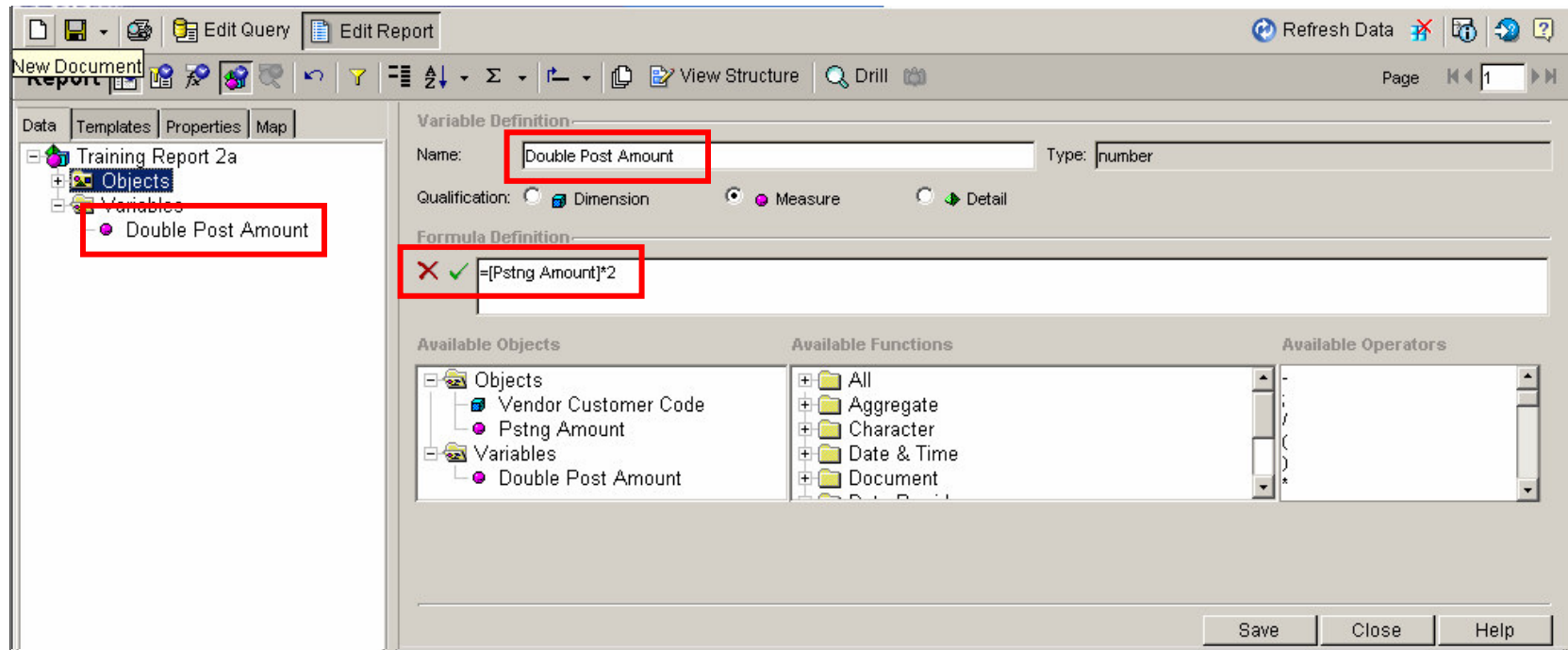
# View Formula Toolbar



- Click on view/hide Formula toolbar
- Double click on  to expand
- Create complex Formulas !!!



# Variable Editor



- Users can create their own variables
- Will be stored on Server, so they are shared !!!!
- Will show in variables section
  - Example: Double Post Amount



# Use new variable

Report Editor Interface:

- Menu: Edit Query, Edit Report
- Report Tab: Data, Templates, Properties, Map
- Tree View: Training Report 2a
  - Objects
  - Variables
    - Double Post Amount
- Table: Test Report to Show Toolbars

Vendor Custome	Pstng Amount	Double Post Amo
00003	12,500.9	25,001.8
00004	4,201	8,402
00005	27.87	55.74
00011	300	600
00012	2,000	4,000

38,059.54

1. Drag and drop new variable into table
2. Drag and drop anywhere else
  - **What will the result be ?**

# Structure View / Results View

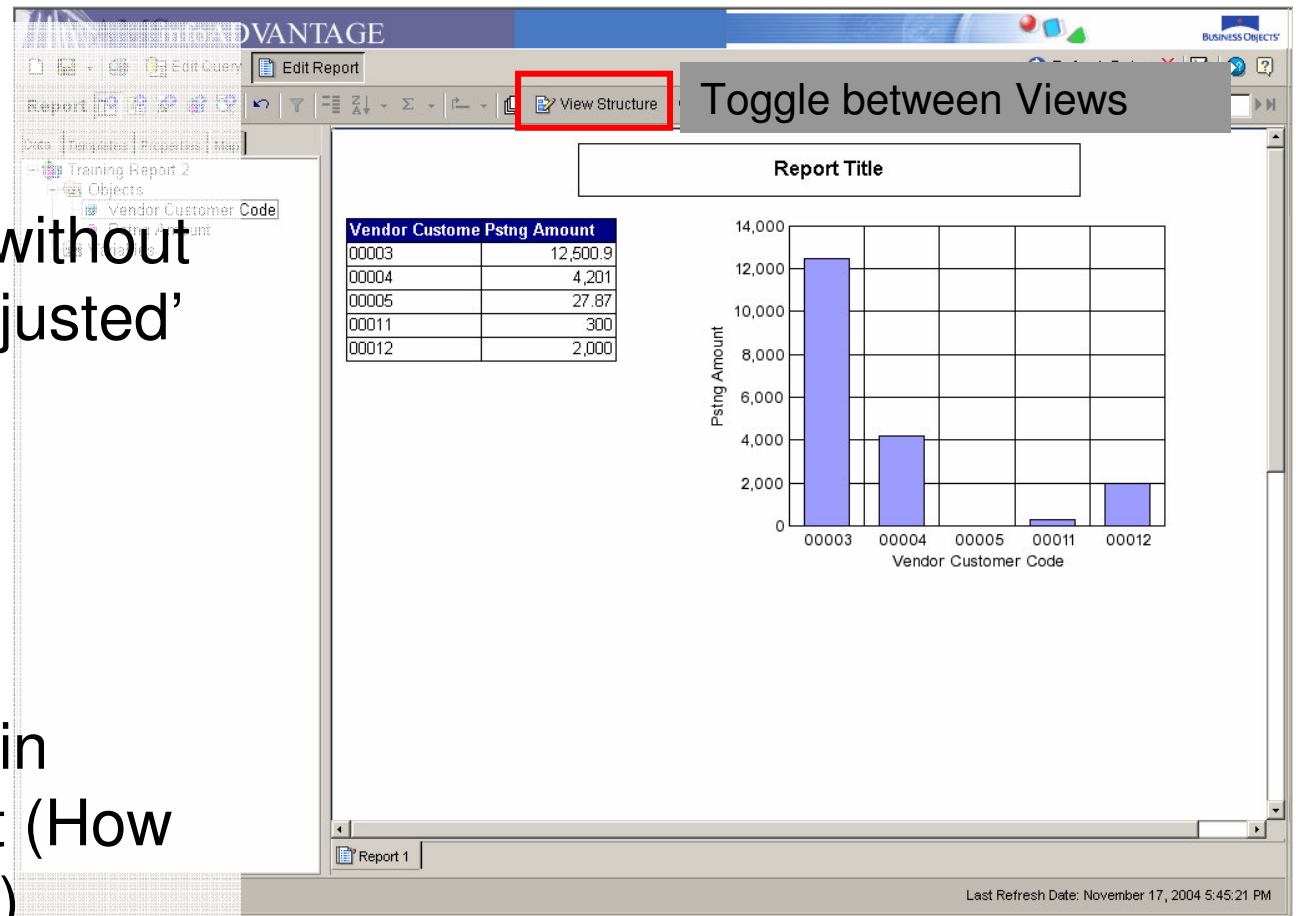
Structure view:

- 'Preview' modifications without data being 'adjusted' every time
- Easy to apply changes

Results view:

- Displays data in defined format (How user will see it)

Toggle between the two



# Different Data Manipulation Options

The screenshot displays the AM infoADVANTAGE software interface. The 'Report' menu is open, and the 'Map' option is highlighted with a red box. The 'Cell Format' panel is visible on the left, showing options for text, background, and border formatting. The main report area displays a table titled 'Vendor Customer Pstng Amount' and a bar chart titled 'Pstng Amount'.

Vendor	Customer	Pstng Amount
00003		12,500.9
00004		4,201
00005		27.87
00011		300
00012		2,000

The bar chart shows the 'Pstng Amount' for each vendor, with the y-axis ranging from 0 to 14,000. The bars are blue, and the x-axis labels are 00003, 00004, 00005, 00011, and 00012.

Report Title

Pstng Amount

Vendor Customer Pstng Amount

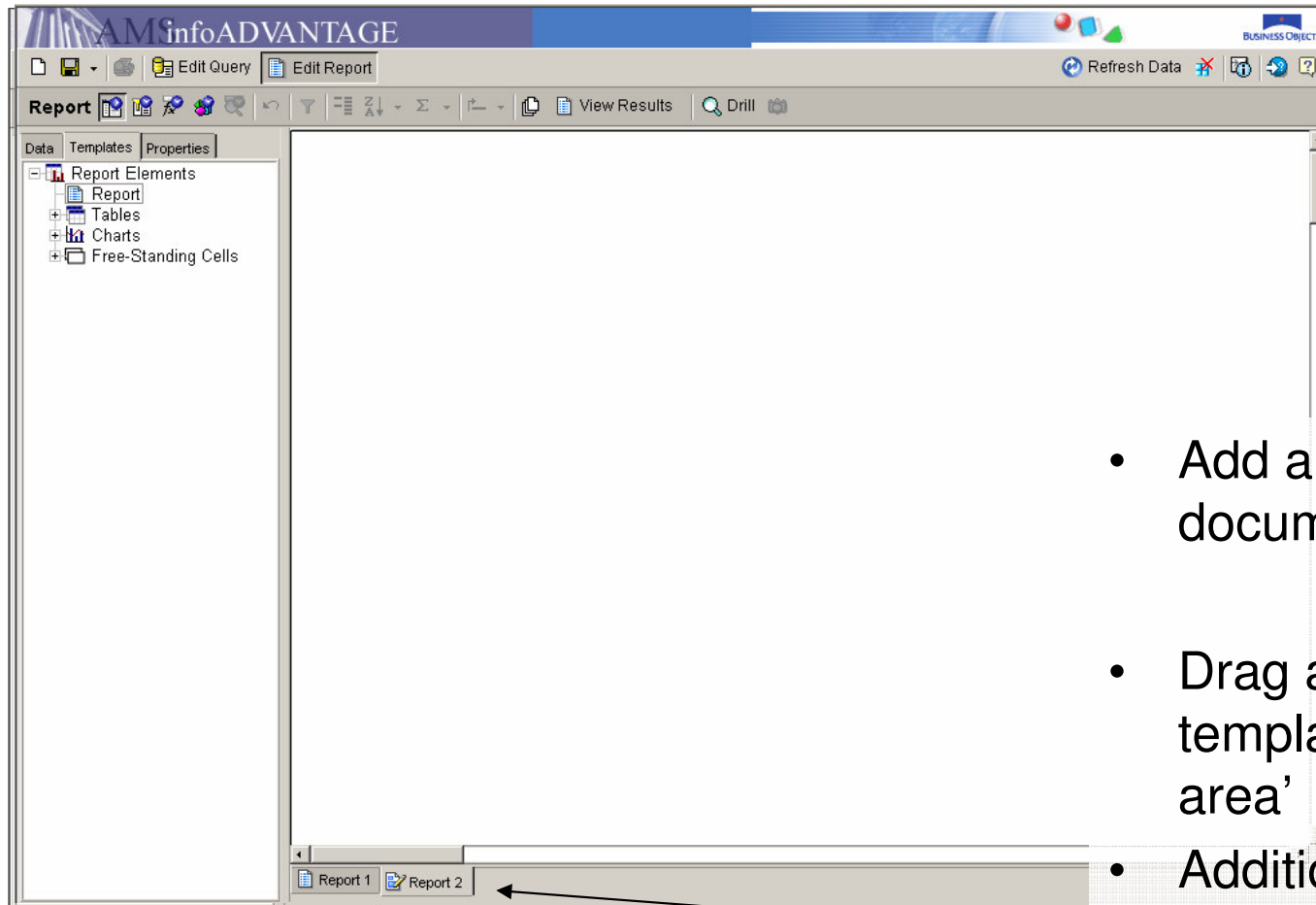
00003 00004 00005 00011 00012

Report 1

Last Refresh Date: November 17, 2004 5:45:21 PM

- Data: all elements available in report
  - Templates: All options to display data
  - Properties: Set colors, cell format etc
  - Map: Maps to (sections) in report
- Note: cells highlighted

# Templates - Add a report



- Add an extra 'tab' to the document
- Drag and drop 'report' template into 'work area'
- Additional report screen created automatically

# Adding a table/chart – Drag and Drop

1. Just 'drag and drop' the fields needed from the data tab

Or

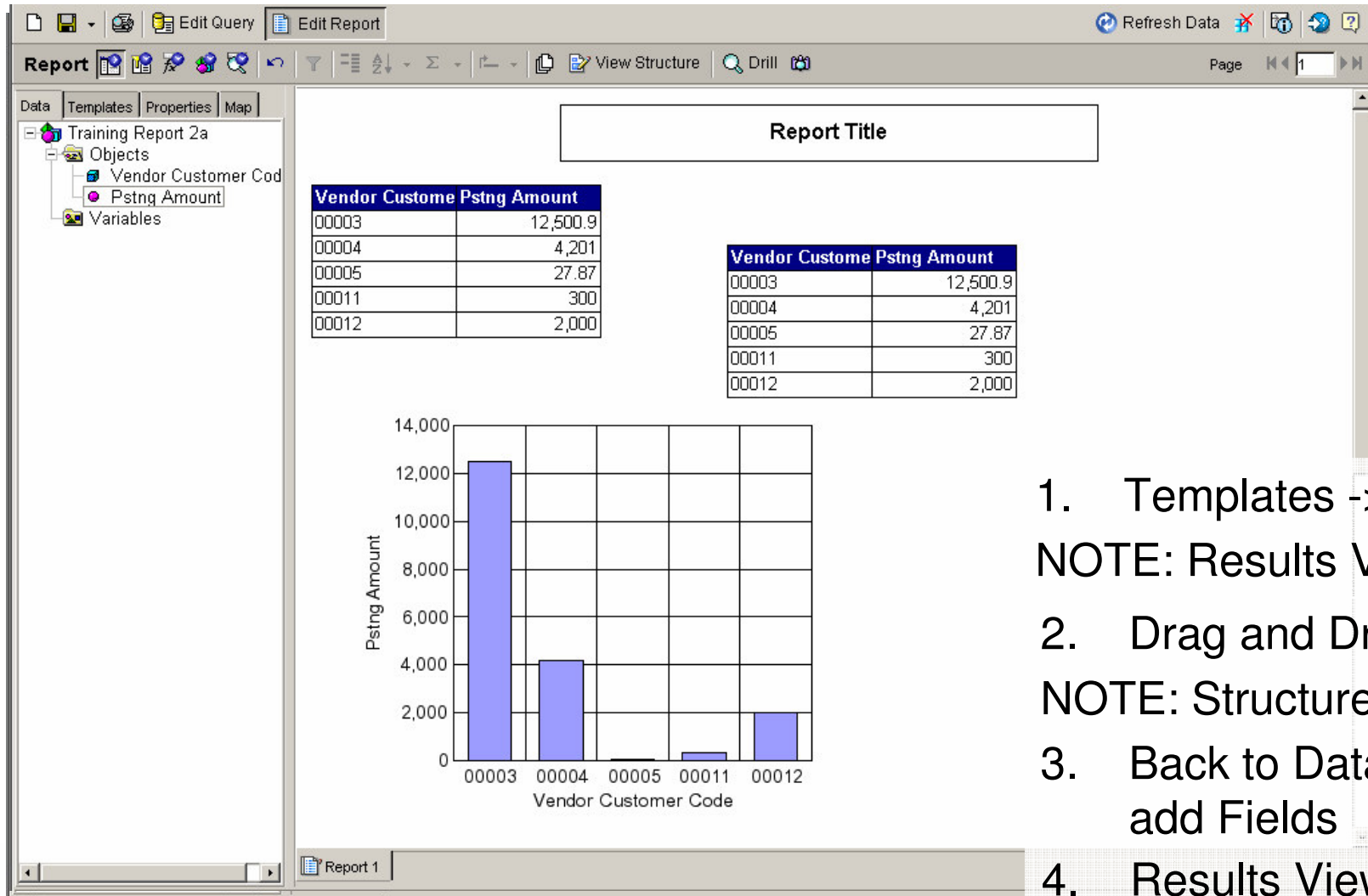
2. Go to templates
  - Insert correct table/chart
  - Add fields through 'drag and drop' from Data tab
  - Example on next slide

The screenshot shows the AMinfoADVANTAGE web application interface. The title bar indicates it is a 'Web Intelligence Java Report Panel - Microsoft Internet Explorer provided by AMS'. The main content area displays a report titled 'Report Title'. On the left, there is a 'Data' tab with a tree view showing 'Training Report 2a' and 'Objects'. A 'MultiSelection' dialog box is open, showing a table with columns 'Vendor Cust' and 'Pstng Amou'. The table contains the following data:

Vendor Cust	Pstng Amou
00003	12,500.9
00004	4,201
00005	27.87
00011	300
00012	2,000

Below the 'MultiSelection' dialog, there is a table with columns 'Vendor Cust' and 'Pstng Amount' containing the same data. The bottom status bar shows 'The Unique Identifier assigned to the vendor/customer.' and 'Last Refresh Date: November 17, 2007'. The bottom right corner indicates 'Local intranet'.

# Add a chart - Templates



1. Templates -> chart  
NOTE: Results View
2. Drag and Drop,  
NOTE: Structure View
3. Back to Data Tab,  
add Fields
4. Results View



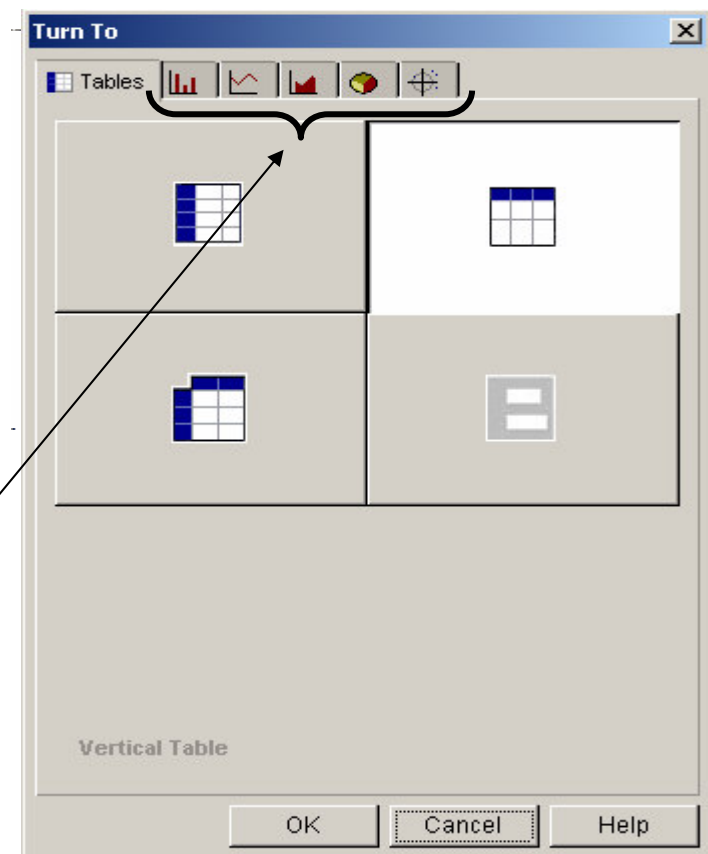
# Display Data in Different Ways

## Edit Table:

- Point to edge of table  
(grey square appears)
- Right mouse click -> Turn To
- Display in Tables:
- Horizontal, Vertical
- CrossTab, Form
- Or change to Chart, etc

Grey Square

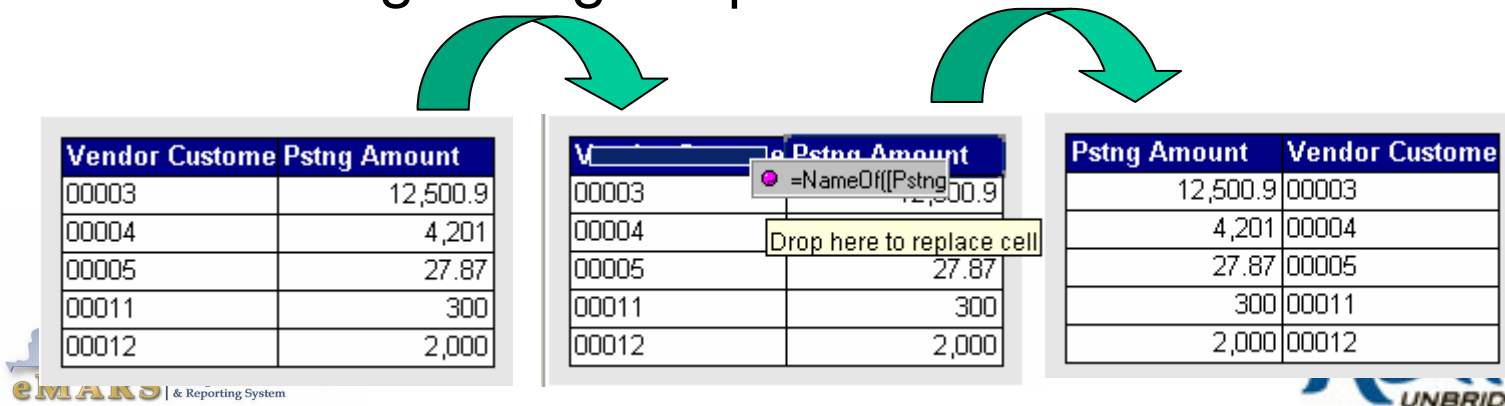
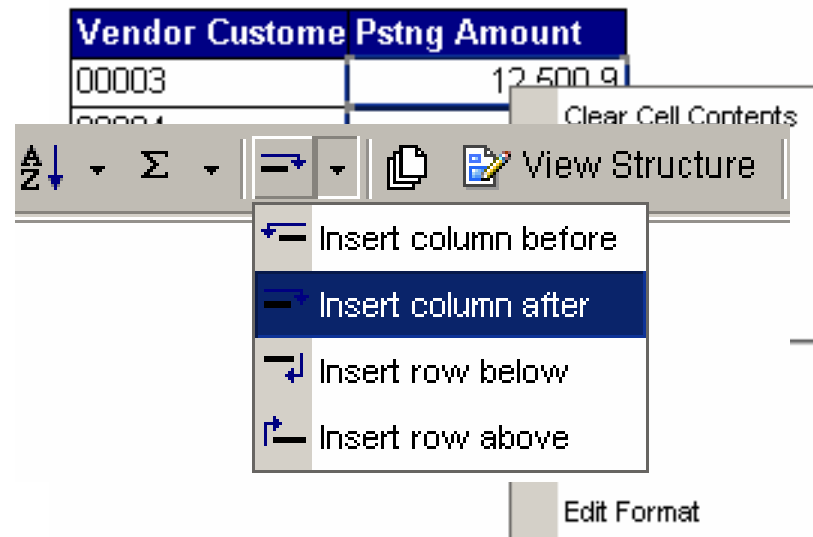
Tabs to change lay out





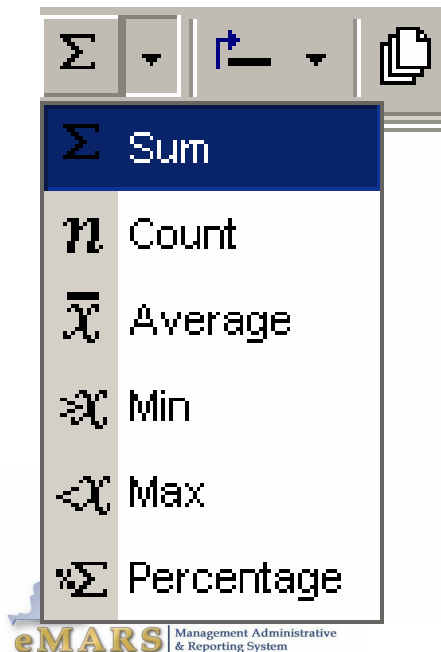
# Modify an Existing Table

- 'Drag and Drop' to add additional fields
  - Be careful not to create crosstabs
- Remove fields
  - Entire Columns
  - Contents
- Add Fields/Columns
- Swap fields
  - Through Drag/Drop



# Add Calculations

- Standard
  - Sum/Count etc
    - Select cell
    - Click on  $\Sigma$
    - Sum appears



Vendor Customer Pstng Amount	
00003	12,500.9
00004	4,201
00005	27.87
00011	300
00012	2,000
<b>Sum:</b>	<b>19,029.77</b>

- ♦ Standard options
- ♦ Note: Count can be applied to all fields, other calculations only to numeric fields

# Modify Existing Table – 2

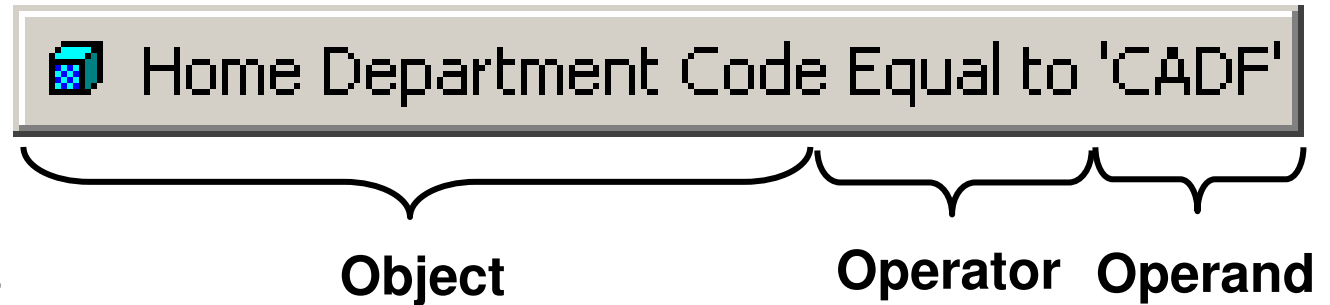
## Add Breaks

- Better readable table
1. Highlight the field
  2. Select Insert/Remove Break
  3. See results
  4. Modify footers
    - Example:
    - Add sum
    - Remove line in between

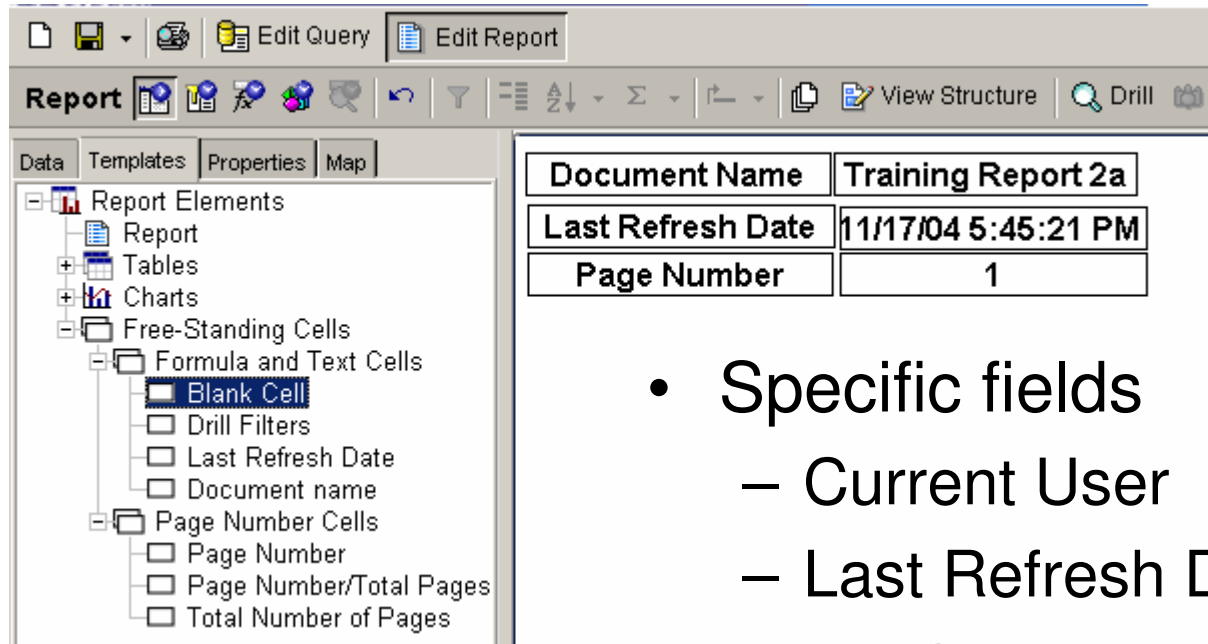
Vendor Custome Pstng Amount	
00003	12,500.9
<b>00003</b>	<b>12,500.9</b>
Vendor Custome Pstng Amount	
00004	4,201
<b>00004</b>	<b>4,201</b>
Vendor Custome Pstng Amount	
00005	27.87
<b>00005</b>	<b>27.87</b>
Vendor Custome Pstng Amount	
00011	300
<b>00011</b>	<b>300</b>
Vendor Custome Pstng Amount	
00012	2,000
<b>00012</b>	<b>2,000</b>
<b>Sum:</b>	<b>19,029.77</b>
00012	2,000
<b>00012</b>	

# Filters – Advanced Topics

- Filter lay out:
- Report filters
  - Entire report
  - Just one block
- Query Filter
  - Advanced
    - Subquery
- Use wild cards: %, matches pattern
- Add Prompts



# Add stand alone cells



- Specific fields
  - Current User
  - Last Refresh Date, etc
- Blank/Custom cells
  - Tip: use Min/Max to prevent Multiple Values
  - Add Custom Formula

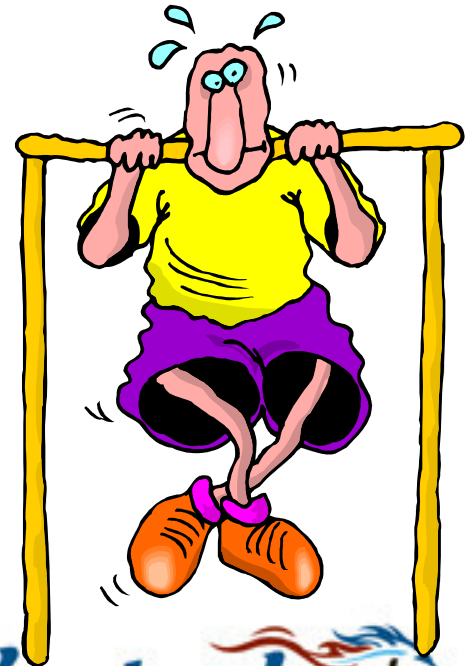
# Save and Print Documents

- Don't forget to save changes !!!
- Print document:
  - Save/View as PDF
  - Print



# Exercise / Workshop 1

- Use report created in previous workshop:
  - Universe: Accounts Receivable
  - Fields: Headquarters account code, Debit amount
- Set filter to reduce number of records returned
- Add a column that contains Debit Amounts \* 2
  - (HINT: create a formula in the new column)
- Add a graph/chart that reflects the data
- *Extra: add breaks/sections etc.*





# Questions

